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October 19, 1955

MEMORANDUM FOR THE RECORD

SUBJECT: Recommendations on CIA Position Standards, GS-0306, Records Management Series

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Proposed

1. That section IA be reworded as follows following - - -" and administering records management - - -".

- - - Programs on a staff or operating level basis, such programs to cover any or all of the following functional areas: records creation, records maintenance and use, records disposition, and vital materials.

2. That the following be substituted for the second sentence in section C (Background Information):

By controlling and improving records from their creation or receipt to their disposition, the program aims to obtain for the Agency improved records and economies in manpower, supplies, equipment, and space.

3. That the last sentence in the first paragraph of section C be reworded as follows:

The program is divided functionally into reports management, correspondence management, forms management, records systems, *and* files standards, records disposition, and Records Center operations.

4. That in section C, reports management and correspondence management be described separately as follows:

Reports management involves developing and improving reporting systems to provide management with the type and quality of reports essential to its function; eliminating and preventing nonessential reporting; providing simple and direct reporting methods; ensuring that instructions, forms, and procedures for necessary reporting are clear and complete; maintaining a central reference file on requirements for reports and periodically publishing an index thereof.

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Correspondence management involves developing and installing form and pattern correspondence, correspondence indexes, and other labor-saving techniques or devices; formulating and establishing procedures and style standards for the uniform preparation and handling of Agency correspondence and the development of guides for their use; developing guides and promotional material for improving the writing ability of Agency personnel; and evaluating and promoting the use of labor-saving stenographic and typing supplies and equipment.

5. That the following functional statement be used to describe the forms management activity beginning "installing forms prescribed by a higher etc - - -"

Preventing the creation of forms with limited local application by extending the use of existing forms;

6. That the functional statements for records systems management be restated as follows:

a. Add the following underlined words to the first sentence: "Records systems management involves evaluating, developing, or applying new methods etc."

b. Revise the second functional statement as underlined in the following: "determining adequate means and establishing standards for maintaining current records in terms of etc."

7. That the functional statements for vital materials management be reworded somewhat along the following lines:

Vital materials management involves advising and guiding officials responsible for selecting materials vital to reconstruction of the Agency; determining the media and frequency of deposit; establishing indexing and filing systems; and developing disposition instructions.

8. That the functional statements for records disposition be revised similar to the following:

Records disposition involves identifying and classifying Agency documents, letters, reports, forms, charts, maps, books, pamphlets, manuals photographs, illustrations, etc as to location, volume, and function, and determining whether such documents are record or non-record in character; determining and recommending disposition by permanent preservation, microfilming, or destruction according to applicable laws and regulations, or removal from office areas to less expensive Records Center storage.

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25X1 9. That the functional statements for the Records Management Staff be revised as follows in line with statements of responsibilities in proposed Regulation No. []

or (2) in the Records Management Staff with responsibility for directing and coordinating the Agency Records Management Program by providing basic plans, policies, and procedures, and staff guidance for their application to area programs; promoting the installation of programs with Agency officials; and conducting surveys and operational audits in problem areas of records management.

10. That consideration be given to separating the GS-12 grade from the group category GS-9 through GS-12 described on page 4. Since the GS-12 grade is considered to be the journeyman level, but does not call for the program development standards of the GS-13 and above grades, I feel that it should be described separately. In addition to requirements for planning and directing surveys, the GS-12 standards should call for an ability to develop regulations, notices, staff studies, handbooks, and other forms of written material designed to implement records management procedures and practices.

Proposed Position Evaluation Chart

1. Under Duties for GS-7, suggest "application" be substituted for "preparation" in "preparation of disposal schedules."
2. Under Duties for GS-5 and GS-7, recommend that reference to attendance at formal classes in records management and participation in other training activity be worded as follows:

Incumbents are encouraged to attend formal classes in records management and are given training by members of the Records Management Staff.

25X1 These requirements for training should be elaborated on in section F of proposed Handbook No. []

3. Under Supervision and Guidance Given, GS-11, suggest the following for Staff officers: "Staff officers at this level are available for guidance of GS-9 assistants; however, supervision is of a technical nature only."

4. Under Scope and Effect and Mental Demands for grades GS-9 through GS-13 recommend that statements be included appropriate to the forms design and analysis services provided by the Forms Management Branch.

✓ 5. Under Duties for GS-11, suggest adding, "or forms analysts," as one of the staff duties.

6. Under Scope and Effect for both GS-11 and GS-12, strongly recommend that we avoid citing any particular component as being small or large with respect to its effect on the grade of an area records management officer. While one component may not be as large as another the complexities of operating a program in the smaller one may far exceed those of the larger. Moreover, although a component may be extremely large, its functions may not be nearly as diverse as those of a smaller element, e.g., the diverse logistical support activities of the Office of Logistics compared to the singular research and reporting functions of ORR. In other components there may be a greater volume of activity in a particular functional area of records management. For example, in the Office of Personnel there is more demand for specialized talent in forms, reports, and correspondence management. I therefore recommend that Scope and Effect be worded along general lines without reference to specific components.

7. Under Duties, GS-13, suggest adding "Program such as" after "Records Management" in the fourth line, and the word "management" after "reports" in the same line. Delete the "and" following "management" and replace it with a comma.

8. Under Supervision and Guidance Received, GS-13, suggest the following wording in lieu of that proposed:

Supervision is essentially of an administrative nature since the officer is responsible for planning, developing, and directing programs under his preview and assuring that their objectives are realized. Supervision consists of obtaining clearances when difficulty is encountered in dealing with top-level officials; securing approvals of major plans and projects; and obtaining advice and concurrences on proposed actions to ensure coordination of program activity with other records management functions. The technical operation of programs is the direct responsibility of the officer. Hence, a review of his work is principally on the basis of accomplishments.

9. Under Personal Work Contacts, GS-13, recommend that the first line be deleted in favor of the following:

Contacts are characterized by frequent dealings with administrative and operating officials principally at the higher levels, incident to the responsibility for directing a broad activity within the records management program.

10. Under Duties, GS-15 suggest that "in private industry and public administration" be used in lieu of "of the Federal government," in the last line.

11. Under Personal Work Contacts, GS-15, suggest using "in complying with" instead of "in executing" as proposed in the last sentence.


Records Management Staff

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